

Session 3: Module 4 - Scan Documents Part 1	
FINAL	
Description	Text
1. Introduction	Welcome to Session 3 Module 4 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Document Imaging Part 1
3. Scan	M-SPIRIT has the ability to scan individual documents into a participant's folder.
	Some of the benefits of scanning are it reduces the amount of paper that has to be maintained by clinics;
	it can be used to scan forms such as: Proof of Identification, Proof of Residency, Proof of Income, Fraud/Abuse forms, Voided Benefits, Release of Information, Formula Requests/Approvals, and other necessary information not already found in the participants folder.
4. Scan1	Scanning allows paper documentation to transfer with the participant record.
	The primary intent of scannable documentation is to provide a method for maintaining all of the participant's information in the participant folder, NOT to provide another method of documenting information we already document in other ways in the system.
	By scanning paper documentation that is typically maintained outside of the system, the participant folder becomes a more robust tool and provides for a more complete transfer of information when participants transfer to other agencies.
5. Scan2	The scanners are single-page scanner since M-SPIRIT requires each document to be scanned individually into the participant folder. The scanner can scan documents up to 8 by 11 inches in size.
	In order to use the document imaging capabilities, the scanner must be physically attached to your computer.
	If it isn't connected, the system will prompt you with a message indicating "Unable to scan. Unable to open default TWAIN device.", which just means it can't find the type of device it is looking for to start the scanning process.
6. <noscan>	<no script>
7. <scan1>	Open Little Duckling's folder by double-clicking on her name or clicking the Open Participant Folder icon.

8. <scan2>	Before scanning you always want to ensure the scanner is connected to your computer via a USB port and turned on.
	Click the Document Imaging menu.
9. <scan3>	Select Scan a Document. (Remember, we can only scan because the scanner is physically attached to our computer.)
10. <scan4>	<no script>
11. <scan5>	M-SPIRIT will walk you through the scanning process.
	The first screen reminds you to load the document onto the scanner if you haven't yet.
	Assume we've loaded the scanner with our document and we are ready to commence the scanning process. Click OK.
12. <scan6>	Once you click OK, the scanner will begin scanning the document...
13. <scan7>	...and show its progress.
14. <scan8>	When the document scan is complete, the Scanned Document Information window opens.
	You are required to select both a Document Type and enter a comment.
	Click the Document Type drop-down arrow to open its menu.
15. <scan9>	There are a fair number of options to select from, one of which will hopefully match the type of document you are scanning.
	For this document, select Other.
16. <scan10>	<no script>
17. <scan11>	<no script>
18. Scan3	Although the Document Type is required and the options are meant to provide a description of the scanned document, it does not display anywhere in M-SPIRIT. However, it is saved to the database.
19. <scan12>	The Select button allows you to insert this document into other household member's Participant Folders without having to scan the document again.
	Since we also want this document scanned for Little Duckling's sibling, click the Select button.
20. <scan13>	To insert the scanned document into Yellow Duckling's Participant Folder, simply click the checkbox in front of his name...
21. <scan14>	...and click the OK button.
22. <scan15>	As we indicated before, a comment is required.

23. Scan4	The comments text box does display in M-SPIRIT.
	We highly recommend that you enter a descriptive title and a page number if the document consists of more than one page. You could also include the total number of pages.
24. Scan5	For example, if you have scanned an approval for PediaSure, you could type "PediaSure Approval" into the comment text box.
	If you have a Health Care Referral more than one page long, you could type "Health Care Referral" and its page number out of the total number of pages.
	This will simplify your ability to determine what each scan is and provide a "heads-up" if there is more than one page to the document. Especially, since in the Review Scanned Documents window (which we will take a look at next), the comment is displayed while the document type is not.
25. <scan16>	We typed a quick description of our document into the Comments text box.
	Go ahead and click OK.
26. <scan17>	A confirmation message opens to indicate the scan has been stored.
	Click OK.
27. <scan18>	Alright! So we've scanned the document and now we need to view it.
	To view a scanned document, you also click on the Document Imaging menu.
	Click the menu again.
28. <scan19>	This time, select the View Scanned Documents option.
29. <scan20>	A grid listing all scanned documents opens.
	The Date and Time each document was scanned is displayed.
	Notice that the Document Type we selected, which was "Other", does not display.
	Instead, the Comment we entered displays.
	This is why we recommended that a description and the page numbers be written in the Comment text field...
	...since that is what displays when you select a scanned document for viewing.
30. <scan21>	Let's take a look at the Scan Test Page document.
	To do so, select the Scan Test Page document in the grid.
31. <scan22>	Now, click the View Document button.

32. <scan23>	The scanned document opens via the Windows Picture and Fax Viewer.
	The image viewer has icons at the bottom of the screen - some of which aren't applicable for a single image.
	For example, the Previous and Next can't be used since the viewer only opens one image at a time.
33. <scan24>	The Delete icon also does not work.
	You cannot delete a scanned document out of the M-SPIRIT application using the Delete function in the image viewer.
	It can only be deleted via the M-SPIRIT application.
34. <scan25>	However, you can use the Zoom In icon to enlarge the image.
	Click the Zoom In icon.
35. <scan26>	You can also Zoom Out.
36. <scan27>	You can rotate the image.
37. <scan28>	You can ignore this message. The quality of your image will not be affected by rotation since the image is actually saved in M-SPIRIT.
	If you choose, you can select the checkbox so that this message no longer appears. For now, we'll just leave it.
	Click the Yes button to proceed with the image rotation.
38. <scan29>	And we can rotate it back (counter-clockwise).
39. <scan30>	You can send this document to the printer (which we aren't going to do)...
	save it somewhere other than M-SPIRIT...
	...and open the image in Microsoft Paint.
40. <scan31>	We will review Reassign Document(s) and Delete Document(s) in the next module.
	Click the Close button.
41. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.